

**21-0009-TDP**  
**ADVISORY SERVICES FOR THE DEVELOPMENT OF REAL PROPERTY**  
 Responses to Questions

Quest #	Question	Answer
1	Do you anticipate extending the bid due date?	No
2	What additional details are you willing to provide, if any, beyond what is stated in bid documents concerning how you will identify the winning bid?	No additional information will be provided beyond what is in the Request for Bid Document.
3	Was this bid posted to the nationwide free bid notification website at <a href="http://www.mygovwatch.com">www.mygovwatch.com</a> ?	The bid was posted to the State of Wisconsin VendorNet and <a href="https://www.wisconsin.edu/capital-planning/property/leasing/">https://www.wisconsin.edu/capital-planning/property/leasing/</a> . It was not posted to, nor will it be posted to any other sites.
4	Other than your own website, where was this bid posted?	See Question 3.
5	If a professional engineering and planning firm is a subconsultant to the prime contractor for this work, and if that firm terminated their subcontract with the prime consultant, would that firm then (a) be eligible to compete for the work that developed within the selected projects or (b) be a member of a team competing for such work?  Hypothetical example: we serve as subconsultant for Phase 1 and then terminate our subconsultant contract with the prime. Can we then be part of subsequent work arising out of this RFP?	Although UWSA will only have a contract with the prime consultant, any subcontractor/subconsultant on the team will not be allowed to compete for any project that is a result of the original contract task.
6	In regards to these services is there a greater emphasis on certain campuses. I.e. is there more requirement in Madison, Fox valley, Eau Claire/Stout/River Falls, Milwaukee, etc. where there is greater need.	This is a system wide contract for 5 years with no specific UW Institution targeted for prospective projects.
7	If possible please outline initial need vs long term.	This is a five-year contract. UWSA cannot delineate any defined project now or in the future.
8	To confirm, we are to provide hours based on one hypothetical project in the Cost Sheet Amendment?	The cost sheet does not require hours for a hypothetical contract. The Cost Sheet Amendment requires an hourly cost per staff title and category.
9	In the Cost Sheet Amendment, are hours per position set? Or the current estimated hours/assignment included as an example?	The cost sheet amendment is structured around a hypothetical project for cost per hour/type of staff comparison purposes only.

## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
10	Please confirm that all UW system campuses are covered within this RFP.	Yes, all UW Institutions will be able to use this contract.
11	Attachment C says that the cost proposal form should be returned in Excel format. However, earlier in the RFP it stipulates 1 electronic copy of the proposal should be submitted. Please confirm we should submit one PDF and an Excel file.	The cost proposal must be submitted in Excel format. If you are referring to Section 2.2 Submittal Instructions, "E-mail submissions must be a scanned copy of the document with ACTUAL signatures and initials and must be received prior to 2:00 p.m. CST/CDT on the stated due date." This is specifically referring to your responses to the RFP questions and sections that your company must sign. These responses will become part of the contract and require actual signatures.
12	Does the aggregated cost that is in the Cost Proposal Form reflect the University of Wisconsin System's expected price to engage the designated team for, no matter the type of real estate asset? Alternatively, is the aggregated cost an indicator of how the designated team will price services, and that team will then have the opportunity to propose pricing based on a specific task once selected?	Any and all hourly wages provided in the Cost Proposal Form will be incorporated into the final contract. The quantity listed on the form is for internal comparison only. Any cost increases are governed by Section 3.6 - Firm Pricing.
13	Please confirm whether all institutions and campuses in the University of Wisconsin system are within the scope of this RFP. Specifically, does the scope include institutions such as the UW Health and UW Hospital?	As stated in section 1.3 Scope, all UW Institutions will have the ability to utilize this contract. However, as UW health and UW hospital are not part of the UW System, they are not included in this solicitation.
14	Does the scope of this project include evaluating existing assets that may be redeveloped and/or leveraged, or even monetized, as well as new greenfield projects at the respective institutions and campuses?	Yes.
15	Section 3.4.4 of the RFP references the "Standard Terms and Conditions", please provide this document.	<a href="https://doa.wi.gov/Forms/DOA-3054StandardTermsandConditionsRFB-RFP.doc">https://doa.wi.gov/Forms/DOA-3054StandardTermsandConditionsRFB-RFP.doc</a>
16	Reference is made to the Cost Proposal Form, footnote 3, and that rates must be all-inclusive. Does this include anticipated travel expenses if and when necessary?	Yes, all travel cost must be included in your proposed hourly costs. No additional fees will be paid.
17	Please confirm how the Cost Proposal will be evaluated. Is the evaluation based on the sum of the Total Aggregated Costs (i.e. sum of cells F4 – F10)?	Yes, it is based on the sum of F4-F10.

## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
18	Attachment C (Cost Proposal form) includes estimated yearly hours for specified positions. If a proposer has identified additional positions for the work, can the proposer provide an alternate breakdown of hours?	Please refer to the cost sheet footnote 2.
19	Does the University plan to select a "bench" of more than one firm from which they will call upon to provide price quotes for service orders on a per project or per task basis?	See section 5.4 Contract Award. This section will be amended to permit the possibility of multiple vendors awarded a contract.
20	If service orders will be granted on a per project/task basis, can a selected firm opt out from a future project/task due to potential conflict of interests?	A proposer can opt out of future projects due to conflict of interest if the other projects are with the same UW Institution. In that case, the contract could be terminated and they will be removed from the eligible vendor list.
21	Does the University expect the proposers to modify the estimated hours on the Cost Proposal Form? Or must the estimated hours in the Cost Proposal Form remain unchanged?	See Questions 8 and 9.
22	I was told I do not need to register for VendorNet for this bid. Should this be stipulated on the form?	This is not a requirement unless you found this solicitation on VendorNet originally. If you found it there or are interested in doing business with other entities, this site allows you to register to get emails about opportunities. All state agencies are required to post their solicitations to this site.
23	Are you looking for a generic copy now and once awarded one with the specific entities on it? Do I need to send one with the response?	You do not have to provide a copy with your response. Upon execution of the contract you will need to provide your insurance certificate in compliance with the RFP's requirements.
24	Contact Information for: Since this is for advisory services, can this be entered as Not Applicable	No, you must provide information about who we should contact in case there are questions. This may not be applicable for returns, but the rest of the contacts must be provided.
25	American Made Mark Unknown – no materials involved in RFP	Both materials and services must be provided from within the US. This is a mandatory requirement.
26	Other Eligible Purchasers-This again is for advisory services. Should I check No and stipulate reason?	You do not need to stipulate a reason if you check 'No'.
27	Cost Proposal Form-Can we modify the form? We do not usually bill hourly.	UWSA has a statutory requirement to make sure that we competitively compare vendors based on technical merit and cost. UWSA will not accept any other cost mechanism than hourly costs.

## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
28	Regarding the cost proposal for this RFP, we are hoping for some clarification. As each potential project could vary in scope and size, we are not sure how to accurately estimate the number of hours for an assignment. The cost spreadsheet included with the RFP has the number of hours populated, are we to assume that you will evaluate it based on the number of hours provided in the spreadsheet?	See answer to Question 9.
29	Does the University have a budget range in mind for potential assignments stemming from this RFP?	See Question 7.
30	On page 8 of the RFP, it mentions proposals should be typed and submitted on 8.5 by 11-inch paper and bound securely. We just wanted to confirm binding is not necessary as it will be submitted electronically.	This solicitation is accepting only emailed copies. Please disregard this requirement.
31	The proposal mentions e-mail submissions must be a scanned copy of the entire document with actual signatures. Could we add a scanned copy of the signature within the digital document so that we can keep the document text searchable? OR should we print and scan each page for the submission?	Signatures must be original. Please print, sign and scan each page. The only exception to this is the cost sheet which must be provided in excel format.
32	Does the System plan to select one or multiple advisors to serve the University and its member institutions as part of this procurement process?	See Question 19.
33	Section 5.2.1. Would the Committee consider re-evaluating the weighting of proposed fees re: costs given the wide range of advisory services, opportunities, and transactions types proposed in the RFP? The current scoring approach could be difficult for the Committee to make apples-to-apples comparisons for fees given the breadth of the ask.	No changes to the cost sheet will be made at this time.
34	We understand that the Cost Proposal Form footnote #5 states that one form should be completed for "all 3 phases." Would the Committee be willing to consider requiring respondents to complete one Cost Proposal Form per phase?	Please keep in mind that the main purpose of this document is to get your hourly wage by function and is the basis for comparison between proposers.
35	Is this RFP directed towards projects that are redevelopment opportunities of existing facilities or new build on open spaces?	Both.

## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
36	Is this RFP directed towards ongoing/general services the UW System needs to address or is there a specific project(s) for which this RFP was initiated? If there are specific project(s) in the pipeline, can any information be provided, such as location and size of project(s)?	The RFP was issued to assist UW System institutions that are considering real estate development projects, which will be part of the contracted service. There is not a specific project in the pipeline.
37	Can a general scope be shared, such as the minimum/maximum number of expected project opportunities within the initial three-year term?	See Question 7
38	How is the UW System planning to fund/finance these real estate opportunities and are there public/private partners other than the State of Wisconsin expected to be involved in these ventures?	The UW System will not finance these real estate opportunities. The funding and partnership opportunities will be determined by the individual UW Institution and the proposed development.
39	In section 1.2 of the RFP document, and below in the e-mail solicitation the word firm(s) is used and our interpretation is that two or more smaller firms could team up to respond to this RFP. For our team submittal, should we provide Bidder Certification (on page 1 of RFP), Attachment B, etc. for the firm serving as main point of contact for the team or include one of these forms for each firm on the team?	There will be multiple contract holders (Primary Vendor) awarded under the resulting contract. However, that Primary Vendor could utilize other entities as Subcontractors.
40	In section 2.2 of the RFP document, it states that one electronic copy can be submitted. The first sentence in 2.3, "Proposals should be typed and submitted on 8.5 by 11-inch paper and bound securely", implies that a paper copy(ies) will be generated. Please clarify if an electronic submission is sufficient or provide more detail on paper submission, if required in addition to electronic submission.	See Question 30.
41	Is the University open to all types of asset classes or uses for the properties, including specialty type uses such as Senior Living and affordable housing?	Yes.
42	How many properties are anticipated to be included within the Phase 1 analysis and are they vacant land or improved property with structures?	See Questions 7 and 35.
43	Where are the properties located?	See Question 7.

## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
44	Item 4.6.3 refers to the “real estate needs” of UWSA – are there specific needs in mind by the University already?	See Question 7.
45	Item 4.5.5 asks about the public competitive procurement process – is this related to services to be procured by an owner’s rep (phase 3) or procurement of interest through an RFP for potential projects brought to market as a result of the advisor’s work?	Both.
46	Are the properties all owned by the same ownership structure?	All property is owned by the Board of Regents of the University of Wisconsin System, the State of Wisconsin.
47	The RFP references the Board of Regents – can you describe their role in the process of redevelopment or disposition of an asset and indicate whether the Board has set forth any policies related to the use, reuse, leasing or sale of land or improved property?	Board of Regents approve all sales, and lease transactions as fiscal or term thresholds are reached. Board of Regents policies relating to sale and leasing of land and buildings can be found under Section 13 at <a href="https://www.wisconsin.edu/regents/policies/">https://www.wisconsin.edu/regents/policies/</a> .
48	Please define the scope of work expected for an owner’s rep.	See Question 7. The Scope of work will be defined as the project dictates.
49	Cost Sheet: a. Is it acceptable to show proposed cost per phase and per development rather than just one aggregated cost? b. Should sub-consultants be shown separately or included in the overall cost shown? c. Should owners’ rep work be included in the pricing or is this a future add-on?	The cost sheet is provided as is. Alteration to the cost sheet may be grounds for the Proposer’s response to be rejected. Specifically read the foot notes about other Functions.
50	Who and how many representatives or stakeholders will the Supplier be in contact with from USWA, both on a regular or one-off basis?	Stakeholders will be identified on a project by project basis. No list currently exists.
51	Section 4.6.2 – is this intended to be an internal engagement strategy to ensure all USWA and Supplier stakeholders within the project are engaged and included within the project phases?	The question was intended for the proposer to develop an engagement strategy between internal stakeholders and external consultants.
52	Is the University interested in conceptual design or programming of the various projects that would require an architect or planner? Specifically, for more indepth analysis within Phase II?	A separate contract will be issued for an architect or planner if one is requested for a more in-depth analysis within Phase II; for example, if a land use plan is needed.

## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
53	Please confirm that the following is the only required information from the subcontractor: "If subcontractors or consultants are to be used, provide a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors' organizational capacity and qualifications, and a brief description of the subcontractors' organizational capacity and qualifications." (sec 4.2.3)	Yes, this is the only required information. However, the awarded contractor will need to ensure that any subcontract abides by the requirements of the solicitation and the Contract. The awarded contractor will be legally and financially responsible for the subcontractors.
54	Does the Board of Regent own land that is being considered for development outside of the state of Wisconsin?	No.
55	Is the entire portfolio to be evaluated or is there a select set of properties in which the University System wishes to focus on?	The entire Board of Regents real estate portfolio is not the subject of this RFP. The RFP was issued to assist UW System institutions that are considering real estate development projects.
56	Do University-owned parcels have any collective bargaining agreement considerations to structure around or special issues we should be aware of?	No.
57	Are there any atypical land use restrictions associated with any of the subject parcels?	Atypical land use restrictions will be addressed on a project-by-project basis.
58	Can you specify what is meant by one assignment in the pricing quote?	Assignments will be on a per Institution and project basis. The award Bidder will provide a quote for the project based on the hourly wages that you provide in the cost sheet.
59	What is the anticipated start date for the project?	This is a 5-year contract and there is currently no established start date. Once a contracted bidder is awarded, projects will be identified on an as-needed basis. Milestone and timetables will be developed with the individual Institutions.
60	What are the anticipated milestones in terms of calendar timing for each phase of the project?	This is a 5-year contract and there are currently no milestones. Once a contracted bidder is awarded, projects will be identified on an as-needed basis. Milestone and timetables will be developed with the individual Institutions.
61	The RFP states, "as an additional scope of work, the advisor may extend the contract to perform as the institution's owner's representative during the construction phase of the project". Confirming that we do not need to provide pricing for this in the proposal.	Hourly costs for all staffing types must be provided.

21-0009-TDP  
Advisory Services for Public-Private Partnership

Quest #	Question	Answer
62	Assuming that a respondent does not provide alternate functions or levels on the Cost Sheet, can you confirm that the respondent must insert a proposed hourly wage rate for each of the functions listed, leaving no rows in the Hourly Wage column blank?	See Question 61.
63	Will all work awarded under the contract be based on hourly billing and subject to the hourly wage rates included in the Cost Sheet?	Yes.
64	If a respondent provides alternate functions or levels on the Cost Sheet, how should the respondent apply the Estimated Hours/Assignment to their proposed alternate functions or levels? Is it the University's intent that each respondent propose an estimated number of hours that aligns with the levels included on the Cost Proposal form? For example, senior level or equivalent alternate functions must have Estimated Hours/Assignment totaling 160 hours, in alignment with the Estimated Hours/Assignment listed for senior level functions.	The respondent should attempt to match the estimated hours/assignment to their alternate functions or levels. The estimated number of hours are the basis of the cost proposal metric which will be used when comparing proposals. The hourly rates will remain the same for all three phases of the contract.
65	This section states that certificate of insurance is to be provided upon award; however, in Attachment A – Bidder Response Sheet on page 21, item 3.8 asks “Have you provided an insurance certificate?” Please confirm whether the University would like proposers to provide certificates of insurance included with the proposal response or upon request / upon award of the contract.	See Question 23.
66	What geographic area does this RFP represent within UW-Systems?	This RFP applies to land located in Wisconsin under the purview of the Board of Regents as managed by the 13 UW Institutions.
67	Is there a specific project driving the RFP, or is the RFP general to future UW-System projects?	The RFP was issued to assist UW System institutions that are considering real estate development projects, which will be part of the contracted service.
68	If the selected consultant works with an engineering firm for preliminary land planning would the engineering firm be ineligible to participate in campus projects unrelated to the advisory project?	No.
69	Attachment A – Section 3.8 – asks if a certificate of insurance has been provided. In the RFP Section 3.8 covers Invoicing Requirements. Is there a different document to review for insurance requirements?	See Question 23.



## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
70	Attachment B – Affirmative Action references Section 17 in the Standard Terms and Conditions. The Standard Terms and Conditions portion of the RFP does not contain information on Affirmative Action. Is there a different document to review for this section?	Here is the State of Wisconsin's Terms and Conditions, <a href="https://doa.wi.gov/Forms/DOA-3054StandardTermsandConditionsRFB-RFP.doc">https://doa.wi.gov/Forms/DOA-3054StandardTermsandConditionsRFB-RFP.doc</a>
71	Are you requesting that the consultant modify the hours allocation in the cost proposal, or simply provide hourly rates for the various tasks/roles?	Provide the expected hourly rates for the various tasks/roles.
72	Are you able to provide a sense of the budget for this project?	No.
73	Will the University accept unaudited financial statements, if selected for an award?	Yes.
74	Section 1.2 states, "The proposer must be aware that the selected advisory firm will not be eligible to compete for the award of the real estate development or participate in any of the partnership opportunities that could develop within the selected projects." Is that to say, should CBRE or its subs be awarded #21-0009-TDP, our team/firms may not vie for follow-on transaction work that begets from our advisory services, nor may our subcontractors be party to those future developments/transactions?	Correct. The subcontractor from earlier phases may not have a partnership interest or financial stake in the subsequent proposed development. The subcontractor, however, may be hired again by the development team to perform additional tasks.
75	The RFP asks for a financial advisory firm, while the scope seems to solicit a real estate advisory firm with financial advisory expertise. Can 'financial advisory firm,' in this instance, be construed to be a real estate firm with the capabilities to perform robust and comprehensive financial analyses?	Yes.
76	UWSA's Excel pricing format (attached) is seemingly arranged for use on a per development basis, as opposed to the entire portfolio or single campus basis. Is this correct?	Yes.
77	If so, should we assume the combined 460 hours set forth in the attached is the allotment of hours UWSA asks each bidder to price, regardless of resources required, use, location, complexity, etc.?	Yes.
78	Should the scope of any particular assignment require fewer or more than 460 hours, are we to assume fees will scale up or down based on actual hours required?	Yes.

## Advisory Services for Public-Private Partnership

Quest #	Question	Answer
79	Section 4.5.5 calls for experience and methodology for facilitating a public competitive procurement initiative. Is UWSA seeking information on each bidder's experience adhering to procurement rules and guidelines (once engaged) or seeking information on each bidder's experience running a competitive procurement initiative on behalf of like-kind institutions?	The bidder's experience adhering to public entity procurement rules if they are selected and the project moves to Phase III.
80	Also regarding Section 4.5.5, when UWSA refers to "public" in "public competitive procurement initiative" is it asking for our experience specifically with public entities (i.e. State, local government, state schools, etc.)? Or is it asking for our experience in running a competitive process to the public at large (i.e. setting up a fair and equal bidding process, open to any qualified bidder, on behalf of any type of client, public or private)?	Experience in running a competitive process via a state or other municipal procurement initiative.
81	Does UWSA have a set budget for this overall contract initiative and, if so, will you disclose the budget?	There is no established budget for this initiative.
82	Can you confirm there is no requirement for printed, "wet-signature" proposal submittal, only the email submittal set forth in Section 2.2?	Signatures must be original. Please print, sign, and scan each page. The only exception to this is the cost sheet which must be provided in excel format. "E-mail submissions must be a scanned copy of the document with ACTUAL signatures and initials and must be received prior to 2:00 p.m. CST/CDT on the stated due date." This is specifically referring to your responses to the RFP questions and sections that your company must sign. These responses will become part of the contract and require actual signatures.
83	Similarly, the RFP calls for email submissions to be scanned copies with ACTUAL signatures and initials. May we PDF our response with scanned signatures and initials?	Signatures must be original. Please print, sign, and scan each page. The only exception to this is the cost sheet which must be provided in excel format.
84	The insurance requirements have been requested to be met at the time of award of the contract (as per Section 3.12). However, the Bidder Response sheet #3.8. requires insurance certificate to be submitted at the time of RFP submission.	See Question 23.

21-0009-TDP  
Advisory Services for Public-Private Partnership

Quest #	Question	Answer
85	The insurance requirements have been defined “as provided in Standard Terms and Conditions, Section 22.0”. Please provide these terms so the insurance certificates can be issued in accordance with the requirements	See Question 23.
86	Is it possible to share the form of the contract in advance of submission of the RFP?	The contract is made up of the documents listed in section 3.1 Entire Contract and the State of Wisconsin’s Terms and Conditions, <a href="https://doa.wi.gov/Forms/DOA-3054StandardTermsandConditionsRFB-RFP.doc">https://doa.wi.gov/Forms/DOA-3054StandardTermsandConditionsRFB-RFP.doc</a>
87	Please clarify whether the selection is for a single institution or multiple institutions will be shortlisted under this RFP	Multiple institutions will be able to engage proposers under this RFP.
88	Please clarify whether the historic usage quoted in the Cost Sheet is for a single phase or all 3 phases.	The cost sheet refers to Phase I for a single project.
89	Could e-signatures be accepted in order to cut-down on paper usage created from printing and scanning proposal documents?	No.